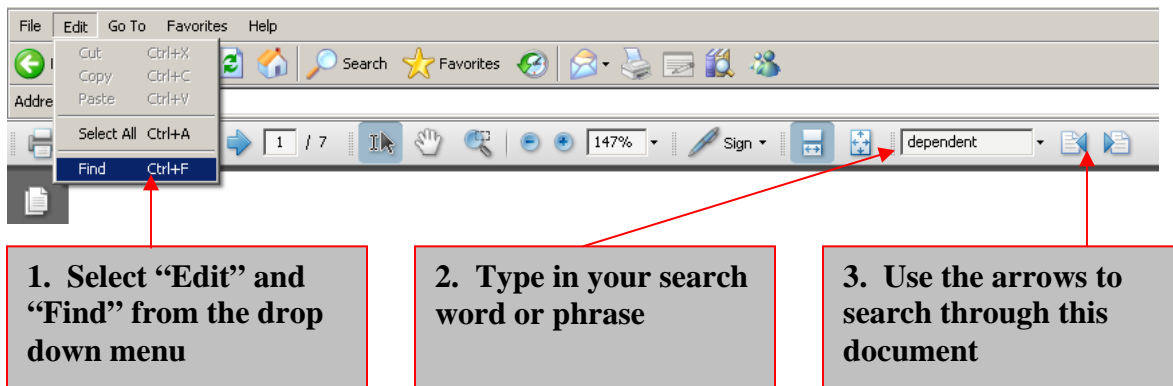


To search this document for the answer to your question(s):



Free File Fillable Forms Frequently Asked Questions

A. General Overview

What is Free File Fillable Forms?

[Free File Fillable Forms](#) is a tool that will enable you to:

- Self-select your federal income tax forms and schedule,
- Fill in your tax information online,
- Perform basic mathematical calculations,
- Print your tax return for recordkeeping and filing or
- e-file your Federal income tax return.

Free File Fillable Forms is the tool for you if you are comfortable filling out the forms and schedules without software help or assistance. If you are not comfortable with this method, you may want to consider choosing a [Free File Tax Software program](#).

This FREE, forms-based program allows taxpayers to choose the Federal income tax forms and schedules they need, fill in information, e-file and sign the return electronically and print a copy for record keeping.

How is Free File Fillable Forms different from tax software?

Unlike most tax software, Free File Fillable Forms is a simple electronic equivalent of paper forms. It provides basic mathematical calculations and basic field error checking. **It does not** ask about or explain tax situations, automatic calculations, extensive error checking. The program provides forms for **federal taxes only**, while most tax software provides federal and state.

Can I use Free File Fillable Forms to prepare and e-file my state tax return?

No. If you want to prepare and file your state income tax return, you may want to choose a Free File tax software program or look for other federal and state tax preparation and e-filing options at the [IRS e-file page](#).

Is the Free File Fillable Forms program new and what is the goal?

[Free File Fillable Forms](#) was offered for the first time in the 2008 tax year. The goal of Free File Fillable Forms is to provide **all individual taxpayers** with the electronic equivalent of the paper forms and instructions the IRS currently provides.

What are the qualifications to use Free File fillable Forms?

With Free File Fillable forms, there are no limitations for income, age, location or any other criteria.

Free File Fillable Forms provides forms that most individual taxpayers require to file their federal taxes.

How do I start using Free File Fillable Forms?

You must access the program by going to the IRS.gov [Free File Fillable Forms page](#).

Is the Free File Fillable Forms program safe?

Yes, your Internet session and transmission of your federal return will be encrypted in a secure environment.

How long will this be available?

[Free File Fillable Forms](#) will be available from Jan. 15, 2011 through Oct. 20, 2011. Taxes must be filed by April 18, 2011. If you file for an extension ([Form 4868](#)) by April 18, 2011, your income tax return must then be filed by Oct.15, 2011.

How is this method different from choosing a Free File tax software program?

There are no income limitations. Therefore, if you don't qualify for one of the Free File software products, you can use [Free File Fillable Forms](#) to file your return online.

What is the advantage over filling out a "pencil and paper" return?

[Free File Fillable Forms](#) allows taxpayers to complete their tax forms online, using the computer, and electronically file over the Internet. Unlike paper returns, Free File Fillable Forms provides basic math calculations and basic field validation checking. E-filed returns are typically processed by the IRS within 24-48 hours. Taxpayers receive their refunds in less time, compared to pencil and paper returns.

Can I use Free File Fillable Forms for filing a prior-year tax return?

No! Only the current tax year forms are available in [Free File Fillable Forms](#).

B. What do I need before starting?

What do I need before starting?

- A copy of your 2009 Federal tax return.
- All income and tax statements you received for 2010, such as Forms W-2, W-2G, 1099-G, 1099-INT, and 1099-R.
- Your 2010 estimated tax payment amounts, if any.
- Your bank account information to get your refund by Direct Deposit or to electronically pay any taxes owed.

If you are going to use [Direct Deposit](#) for a refund, or use electronic fund withdrawal direct to pay any taxes owed, you'll need your routing number and account number for your check or savings account.

What is the registration process for Free File Fillable Forms?

After selecting [Free File Fillable Forms](#) on the IRS.gov [Free File](#) page, continue through to the Free File Fillable Forms screen and create an account. You'll provide your own user ID and password. Save this information, because you will need it each time you sign in to your return. Free File Fillable Forms also requires an e-mail address so that the IRS can notify taxpayers of errors; acknowledge receipt of the return and so that taxpayers can track the status of their return.

C. Creating an Account

How do I create an account?

After selecting [Free File Fillable Forms](#) at the IRS.gov [Free File](#) page, continue through to the "forms screen" and create an account. You'll provide your own user ID and password, which you will save. You will use this information each time you sign in to your return. You will also enter your "e-mail address" so that the IRS can notify you of errors; acknowledge receipt of your return so that you may track the status of your return.

Once you establish an account, you will receive a confirmation email with your username and password and a link to access the application. When returning to the site, **use the link provided** in the confirmation email

How do I change my account information?

To change your account information, click the "**Update Account Information**" link at the bottom **right** corner of the "**Sign In**" screen. Input your password and the account screen will appear. At this account screen, you will have four choices:

1. Change your user ID
2. Change your password
3. Change your security question

4. Change your e-mail address

Click the appropriate link and follow the instructions to make the necessary changes. Click "Save" when finished.

How do I attach a different form?

To attach a form or schedule to your return:

1. Click the **"Add"** button located at the line where the information from that form will go.
2. Input the information into the form or schedule and use the **"Do the Math"** button when necessary.
3. Click **"Done with this Form"** when finished.

4. **IMPORTANT:** Make sure your number entries have been reported on the attached form and have also successfully transferred to where they need to be reported, either your main form or another attached form. **A form will not attach another form until there is a link.**

The form will now be attached to your tax return. To check which forms you currently have attached, click the **"View / Add Forms"** button at the upper right corner and a list of all of the forms that you currently have attached will display.

I cannot find my prior year Adjusted Gross Income (AGI) or prior year PIN?

If you are unable to locate your prior year adjusted gross income (AGI) or prior year PIN, you may use the [Electronic Filing PIN](#) (EFP). EFP Help is an additional method for verifying the identity of taxpayers electronically filing their 2010 tax returns. This new authenticator is necessary for anyone who wants to electronically file and does not have the AGI or Self Select PIN from their 2009 tax return.

To get your Electronic Filing PIN, access www.irs.gov/efphelp or call IRS Toll Free number at 1-866-704-7388 and follow the instructions on the automated system.

If you try to file with incorrect AGI information, the IRS will **reject your return** so make certain you input the correct information. If you did not file a return last year, enter a zero on that line.

How do I e-file my tax forms and authenticate myself in Step 2?

Follow the steps below:

1. Input your prior tax year 2009 Adjusted Gross Income (AGI) under taxpayer. If you are married filing joint, and you filed together in 2009, enter the same amount in the taxpayer and spouse columns for Adjusted Gross Income.
2. Input your prior year PIN. If married filing jointly, input the [prior year PIN](#) for your spouse.

Why do I have to create a new account?

[Free File Fillable Forms](#) is the electronic equivalent of a paper return. The software providers do not retain your account information for subsequent years when using Fillable Forms; therefore, if you used Free File Fillable Forms last year, you must create a new account this year.

How do I access my account if I want to correct an Error?

Access your account by using the URL shown in your **"New Account Confirmation"** email, which was sent when you created your account. Once you are on the provider's page, select **"Sign In / Create an Account"**, and then enter your username and password on the next screen.

D. How to use Free File Fillable Forms

How do I navigate through the program?

Once you are in the Fillable Forms product:

- **Remember - Do not use your browser's back button.** Instead, to return to the previous screen, click **"Done With Form"** at the bottom of the screen.
- You will use two basic elements: buttons and tabs.

After you have chosen your main booklet (for example, 1040A) and completed all necessary forms, select **"Done With Form"** at the bottom of the screen. On the **left** side of your screen, will be a list of the forms you completed. This list of forms builds as you work. You may click on any form in this list to re-open the form to review and/or modify the contents.

At the top of your screen, there are two tabs – one for the [Free File Fillable Tax Forms](#), the other for e-filing your return. When you have completed all your forms, select the e-file tab to e-file your return.

Are there required entry fields?

Yes, you must enter your name, Social Security Number, address, telephone number and personal income information.

If you file electronically, all fields on the e-file worksheet must be completed. The previous year's Adjusted Gross Income (AGI) figure or e-filing PIN will confirm your identity to the IRS.

Should I round entry fields?

No, the [Free File Fillable Tax Forms](#) program does the rounding for you.

Should I include dashes, dollar signs, commas or text with my data entries?

No, exclude all dashes, dollar signs and commas.

If I need help with a line number, what should I do?

Each line of the Forms 1040, 1040A or 1040EZ contains a link to any form, schedule or instructions related to that line. Click on the link for additional help.

You can refer to specific IRS instructions for the relevant form, schedule or publication. [Publication 17](#) is another useful resource for additional information. There is also an “IRS publication link” in the program. By selecting this link, in the upper right hand side of your screen you will be taken to the IRS website that has all of the IRS publications available.

May I make changes after I have entered all my information?

Yes, after you have entered all the information, you can still go back and make corrections.

May I save my return and finish it later?

Yes! Access your account by using the URL shown in your **"New Account Confirmation"** email, which was sent when you created your account. Once you are on the provider's page, select **"Sign In / Create an Account"**, and then enter your username and password on the next screen in the **Returning Users** section.

You will need to remember and enter your user ID and password for access.

What if I enter the wrong data?

If you make an error such as entering the wrong data from a statement, simply go back, delete the wrong information and enter the correct information. If the form is no longer needed you can select the **"Remove This Form"** button at the bottom of the screen to delete the form and the related information.

What are some tips for avoiding common errors?

Make sure:

- Your Social Security Number or Employee Identification Number contain the proper number of digits,
- You do not enter invalid characters,
- The date and telephone number fields are formatted correctly and do not contain invalid characters,
- Your e-mail address is correct,
- The tax amount has been calculated (the system calculates automatically) and
- Your deduction and exemption amounts have been calculated.
- All of your tax information has been entered before going to Step 2 to e-file your tax forms.

Will I be able to view my actual return before I e-file it?

Yes. We encourage you to review your data before submitting your return to make certain all

information is complete and accurate. This simple precaution will help you avoid mistakes that may delay your refund or result in correspondence from the IRS.

What do I do if I decide I don't want to e-file?

If you do not want to e-file your federal tax return, you may print and mail your return to the IRS. For more information about where to mail your federal return, go to the ["Where to File Paper Tax Returns"](#) page.

May I print my federal return for free?

Yes, you may print a copy of all required federal forms and supporting documents for your records, for FREE.

Will I be able to access my completed federal return after it has been accepted by the IRS?

Yes, you can print and view your return through Oct. 20, 2011. If you need a copy of your return after Oct. 21, 2011, you can call the IRS toll-free at 800-829-1040 and request a copy of your transcript (Form 4506-T) at no charge. A fee will be assessed for a copy of the original return.

How do I sign my return electronically?

To file your return electronically, you must sign the return using a five digit Self-Select Personal Identification Number (PIN). A PIN is any combination of five digits you choose except five zeros. If you are married filing jointly, both you and your spouse will each need to create a PIN and enter these PINs as your electronic signature. For more information about the PIN, go to the [Self-Select PIN](#) page.

To verify your identity, you will also be prompted to enter your "prior year" Adjusted Gross Income (AGI) from your originally filed 2009 Federal income tax return. Do not use your AGI from an amended return (Form 1040X) or a math error correction made by the IRS. AGI is the amount shown on your 2009 Form 1040, Form 1040A, or Form 1040EZ.

If you do not have your 2009 income tax return or need help finding your prior year 2009 AGI or prior year PIN, call the IRS at 800-829-1040. **If you filed electronically last year**, you may use your prior year **PIN** to verify your identity instead of your prior year AGI. The prior year PIN is the five digits PIN you used to electronically sign your 2009 return.

What information should I retain for my records?

After you submit your return, print a copy for your records. You should retain this along with other supporting documentation (Forms W-2, 1099 and other attachments). See the ["How long should I keep records"](#) page for more information

How do I know if IRS received my federal return?

You will receive an email confirmation within 48 hours that your return was received by the IRS.

What if I forget my password, user name or security questions?

If you forget your password or username, you will be able to retrieve this information at the beginning of the program. Select the **Sign In/Create an Account** Link. Select the **"Forgot Username/Password?"** at the bottom left of the **"Sign in Screen"**. If you forgot your User ID, you will be prompted to enter the email address you used when setting up your account. An email will be sent to you with your User ID. If you forgot your password, you will need to enter your User ID and after answering your security question correctly, a new password will be emailed to you. If you are unable to recover your password because you do not remember your security question/answer, you will need to create a new account and start over with your return.

What if I receive an email that my return has not been accepted by the IRS due to errors?

E-filed returns are rejected for a variety of reasons. Most happen when information provided by the taxpayer does not match IRS or Social Security Administration records.

If your return is **rejected** by the IRS, that means **it has not been filed**. It's important to resolve the issue that caused the rejection, then you may e-file again. If you are unable to resolve the issue or choose not to e-file, you will need to print the return and file it by mail. For more information about where you should mail your federal return, go to the ["Where to File Paper Tax Returns"](#) page.

Who is responsible if there are errors on the return?

It is **your** responsibility to enter all information completely and accurately. Before you begin, be sure you have all of the information you will need to complete your return. **Always verify all information** on your return before submitting it.

What if I do not have to report a Form W2, Wage and Tax Statement, but I have other income that I need to report, may I still use Free File Fillable Forms?

Yes, but at the screen that reads, **"Step #2, E-File Your Tax Forms"**, you may skip the requirement to add a Form W2.

E. Electronic Filing Personal Identification Number

What is the Electronic Filing PIN (Personal Identification Number) and what is it used for?

The [Electronic Filing PIN](#) is a number issued by the IRS to authenticate your return information. If you do not have your prior year Adjusted Gross Income (AGI) or a prior year PIN and you are filing electronically, you will need an Electronic Filing PIN **to sign the return**.

Am I eligible to receive an Electronic Filing Personal Identification Number?

You are eligible if you do not have your prior year Adjusted Gross Income or an Electronic Filing PIN and you filed a Form 1040, Form 1040A, Form 1040EZ, or Form 1040-SS (PR) in 2009.

If I have a problem signing my return using the Self-Select PIN method, what should I do?

If you are receiving an error message, due to the entry of your prior year Adjusted Gross Income amount or prior year (Self-Select) PIN, you may use an [Electronic Filing PIN](#).

How do I get an Electronic Filing PIN (EFP)?

To get an EFP, go to the [Electronic Filing PIN - Help](#) page or access the touch-tone self-service system at 1-866-704-7388. You will need to provide the following information.

- Your Social Security Number (or Individual Taxpayer Identification Number)
- Your First and Last Name
- Your Date of Birth
- Your Filing Status
- Your complete mailing address (as it appeared on your **2009** tax return)

Once an EFP has been obtained, you will be able to electronically sign your 2010 tax returns, Form 4868, Application for Automatic Extension of Time to File U.S. Individual Income Tax Return with a payment, Form 2350, Application for extension of Time to File U.S. Income Tax Return and Form 9465, Installment Agreement Request. This verification process is not your signature – merely verifying who you are.

You may also choose to view the [Self-Select PIN Method](#) page for additional assistance.

F. System Requirements

What are the minimum computer requirements for using Free File Fillable Forms?

Windows Products

- Processor: Pentium® or Pentium equivalent
- Browsers for Windows Vista: Firefox 3.0 or higher, Microsoft® Internet Explorer 7.x and 8.x, Safari 4.x or 5.x, Chrome 4.x
- Browsers for Windows XP SP2: Firefox 3.0 or higher, Microsoft® Internet Explorer 6.x SP 2 or 7.x or 8.x, Safari 4.x or 5.x, Chrome 4.x
- Browsers for Windows 2003: Microsoft® Internet Explorer 6.x SP2 or 7.x or 8.x
- Browsers for Windows 7: Microsoft® Internet Explorer 8.x, , Firefox 3.0 or higher, Safari 4.x or 5.x, Chrome 4.x

Macintosh Web Products

- Processor: PowerPC® G3 or faster Intel-based processor
- Browser for OSX 10.3x: Firefox 3.0 or higher
- Browsers for OSX10.4x: Firefox 3.0 or higher, Safari 3.x, or 4.x or 5.x,
- Browsers for OSX10.5x and 10.6x: Firefox 3.0 or higher, Safari 3.x and Safari 4.x or Safari 5.x, Chrome 4.x

Non OS Requirements

- Printing: Adobe® Acrobat® Reader® 7.0 or higher
- Memory: 256 MB of RAM
- Internet Connection: High speed Internet
- Monitor: 1024x768 screen resolution
- Flash: Macromedia Flash 9.0 (or higher)

* Leave your browser setting for language set to default so JavaScript and cookies are enabled.

* You will need a printer if you wish to print your return.

* You will need an email address.

G. Where do I go for Help

If I have a tax law question, or questions regarding filling out my tax return, what can I do?

- Refer to the [Form 1040 instructions and 1040 publications](#).
- Use the “**Instructions for this Form**” link at the bottom of the Free File Fillable Forms screen. d
- Refer to [Publication 17](#).
- Access the IRS website, enter your KEYWORD and search for your tax topic.
- Call TeleTax toll-free, available 24 hours a day, 7 days a week at 800-829-4477 to hear prerecorded information about various tax topics in English or Spanish. TeleTax topics begin at page 93 of the Form 1040 Instructions booklet.
- If you still need tax law help, contact the IRS, toll-free at 800-829-1040.
- If you have a hearing impairment, contact the IRS, toll-free at 800-829-4059 (TDD)
- If you live outside the United States, visit the [International Services page](#) on IRS.gov
- You may also want to visit an IRS local [Taxpayer Assistance Center](#).

How do I submit my Form 5405, First-Time Homebuyer Credit?

If you claim the first-time homebuyer credit on your 2010 tax return, Form 5405 cannot be electronically filed. You **must** file a paper return instead and attach the settlement sheets showing that the home sale closed.

Go to the [First-Time Homebuyer Credit](#) page to learn more.

What if I'm having problems with my computer or my internet connection and am unable to access the Free File Fillable Forms Program?

- You may contact your Internet Service Provider (ISP)
- Review the **FAQs on “System Requirements” in section F of this document**, to ensure your system meets all requirements and you are using a supported browser.

When Will I Get My Refund?

You can get your federal income tax return refund information through the IRS' secure Web site 72 hours after the IRS acknowledges your return receipt, if you e-filed or after six to eight weeks a return is mailed. [Where's My Refund?](#) at IRS.gov, is fast, easy and safe. You will need to enter three information items from your e-filed return:

- Your Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN)
- Your filing status
- The exact whole dollar amount of your expected refund.

Who do I call if I need help signing in to the Free File Fillable Forms, accessing my tax return or need help with technical difficulties?

Taxpayers who experience technical difficulties with Free File Fillable Forms can contact the IRS Web Site Help Desk irs.gov.website.helpdesk@speedymail.com.

H. Return Reject

What are the most common reasons an e-filed return could be rejected by the IRS?

The most common reasons [Free File Fillable Forms](#) returns are rejected after e-filing include:

- The prior-year Personal Identification Number (PIN) or Adjusted Gross Income (AGI) does not match what the IRS has in its records. You need to have at least one of these numbers match. If you are getting this error, double-check the AGI and be sure to enter the exact amount from the prior year return. If you did not enter a PIN, make sure you entered the AGI amount. If you need assistance getting last year's AGI or PIN, you may call the IRS toll free at (800) 829-1040 and press # 2.
- There are errors related to the W-2. If you have multiple W-2s, make sure you add the total amount of all income (in Box 1) and enter the totals from box 1 on your 1040 Form. Also, add each withholding amount (in Box 2) and then add to main form. If you are e-filing, you need to attach each W-2 to the return on "**E-file My Taxes**" tab. Be sure that you have completed all the information on your W-2 before e-filing, filling in all fields. Make sure you're using the correct United States Postal Service state abbreviation. If you don't have income to report from a W-2, you can skip the requirement to add a W-2 when you e-file your tax forms.

What if I receive an email that my return has not been accepted by the IRS due to errors? How do I go about correcting the errors?

E-filed returns can reject for a variety of reasons. Most happen when information provided by the taxpayer does not match IRS or Social Security Administration records.

If your return is rejected by the IRS that means **it has not been filed**. It's important to resolve the issue that caused the rejection. Then you can e-file again. If you can't resolve the issue or choose not to e-file, you need to print the return and file it by mail. For more information about where you should mail your federal return, access the IRS website.

Listed below are some common rejection reasons and what to do if you receive one of these reasons after e-filing:

Error Reject Codes

AGI Mismatch Errors

- **Error Code 679:** The amount you entered for your prior year's Adjusted Gross Income (AGI) does not match what the IRS has in its records.
- **Error Code 680:** The amount entered for your spouse's prior year's adjusted gross income (AGI) does not match what the IRS has in its records.

What these mean: The IRS requires you to enter the exact amount of your adjusted gross income from the prior year's return in order to e-file. Do not guess at the amount or round off the number - it must match what your tax return said last year and what the IRS recorded in its database. If you think you entered the AGI correctly, you must call the IRS to resolve the mismatch: 800-829-1040.

You can enter the same AGI for you and your spouse if you are married filing jointly. However, if you and your spouse filed separately, you will need to enter different AGI amounts from each of your previous year's tax returns.

Personal Information Mismatch Errors

- **Error Code 522:** The date of birth you entered on this return does not match what the IRS has in its files for you. The IRS receives this information from the Social Security Administration.
- **Error Code 504:** The dependent's Social Security number and last name on this return does not match what the IRS has in its records. The Social Security Administration provides this information to the IRS.
- **Error Code 523:** The secondary taxpayer's date of birth on this return does not match what the IRS has in its files. The IRS receives this information from the Social Security Administration.
- **Error Code 503:** The secondary taxpayer's Social Security number and last name do not match what the IRS has in its records. The IRS receives this information from the Social Security Administration.
- **Error Code 500:** Primary Social Security Number and Primary Name Control of the Tax Form must match data from the IRS Master File.

What these mean: Personal information provided by the taxpayer does not match what the IRS has in its records. This can be information for you, your spouse or dependents, and includes name, date of birth and Social Security Number. Make sure all of this information is entered correctly and that information exactly matches what is on the Social Security card. If you have entered the information correctly, you will need to resolve the discrepancy with the IRS and/or the Social Security Administration, which provides this information to the IRS. Call the IRS at 800-829-1040 or your local Social Security Administration office.

- **Error Code 502:** One or more of the following does not match the IRS's records: the Employer Identification Number (EIN) (Box b) on Form W-2, , the payer identification number on Form W-2G, the payer identification number on Form 1099-G, the payer identification number on Form 1099-R.

What this means: Information provided by the taxpayer on these various forms is not matching what the IRS has in its records. Make sure you have entered all information carefully and checked your entries. If you have entered the information correctly, you need to contact the employer to resolve the discrepancy.

- **Error Code 510:** This taxpayer or taxpayer's spouse has been claimed as a dependent on someone else's return (according to returns the IRS has already received.)

What this means: If the taxpayer or taxpayer's spouse is being claimed as a dependent on someone else's return, these taxpayers cannot file their own returns. This usually happens when a parent is claiming a child as a dependent.

- **Error Code 507:** The dependent's Social Security number cannot be used, for the same purpose, on more than one tax return.

What this means: A dependent claimed on the tax return has already been claimed on another tax return as a dependent and/or for a tax credit. You can either remove the dependent and e-file again, or claim the dependent and file by mail. If you are still eligible to claim the dependency exemption and/or tax credit, you will need to mail a paper tax return.

Tax Compliance Errors

- **Error Code 0010:** This is a general reject condition relating to the data that is in the Form and Field indicated. Here are some of the more common reasons for this reject:
 - Incorrect bank Routing Number for direct deposit or electronic withdrawal
 - Incorrect dependent relationship type – you can only enter one of the following: Child, Foster child, Grandchild, Grandparent, Parent, Brother, Sister, Aunt, Uncle, Nephew, Niece, None, Son, Daughter, Other.
 - Incorrect “other” wording in Form 1040 Line 60 – you can only enter one of the following literals on this line: EPP, S72P, UT, 453A(c), ADT, 72(M)(5), 453(L)3, 1260(B), NQDC, ISC, HDHP, FITPP. See instructions for more detail.
 - Incorrect proprietor social security number on Schedule C or Schedule CEZ
 - Incorrect “adjustments” wording on Form 1040 Line 60 – you can only enter one of the following literals on this line: RFST, SUB-PAV TRA, UDC, 403(B), 501(C)(18), PPR, FORM 2555, WBF, Jury Pay. See instructions for more detail.
 - Incorrect Employer's code from Box 12a of W-2
 - No filing status entered on Form 1040, 1040A or 1040EZ
 - Form 8888, Direct Deposit of Refund in More Than One Account– missing routing number entered
 - Form 8615, Tax for Certain Children Who Have Investment Income of More Than \$1,900 – missing parent filing status on line c.
 - Form 2555, Foreign Earned Income – incorrect year entered on line 6a and incorrect relationship entered on line 12b.
- **Error Code 0019:** The routing transit number (RTN) is invalid. The RTN must meet these conditions to be valid: must be 9 numeric digits long; and, the first two positions must be 01 through 12 OR 21 through 32. The depositor account number (DAN) is invalid. The DAN must meet these conditions to be valid: must be alphanumeric (i.e., numbers, letters, and hyphens only); cannot be greater than 17 characters in length; and must not equal all zeros. When the DAN has an entry, or if the RTN has an entry, the checking account box must be checked or the savings account box must be checked.
- **Error Code 0037:** Form 1040/1040A - The number of dependents listed must equal the total of the following amounts on line 6: Number of Children Who Lived with You, Number of Children Not Living with You, and Number of Other Dependents Listed.
- **Error Code: 0066:** When dependent data is entered, the following fields are required for each dependent: (1) dependent's first name, (2) dependent's last name, (3)

dependent's social security number, (4) dependent's relationship to you and (5) dependent's year of birth.

- **Error Code 0067:** The dependent's first and/or last name is invalid. The dependent's first and last name must meet these conditions to be valid: all characters must be alphabetic (the only special characters allowed are blank space and hyphen (-)); the first name must contain a minimum of one alphabetic character; and the last name must contain a minimum of one alphabetic character.
- **Error Code 0068:** Your Dependent's SSN is either not within the valid range of SSN/ITIN/ATIN's or is the same as your SSN or your Spouse's SSN or another Dependent's SSN .
- **Error Code 0103:** Form 1040/1040A/1040EZ – Total Federal Income Tax withholding shown on tax form must equal the sum of withholding on Other 1099 and AK Dividend, withholding from Schedule K-1. Withholding on Form W-2, withholding on any Form 1099R and withholding on Form W-2G.
- **Error Code 0105:** When the Routing Transit Number (Form 1040-Line 74b)(Form 1040A-Line 45b)(Form 1040EZ-Line 12b) or Depositor Account Number (Form 1040-Line 74d)(Form 1040A-Line 45d)(Form 1040EZ-Line 12d) has an entry, both are required and either the Checking Account box (Form 1040-Line 74c)(Form 1040A-Line 45c)(Form 1040EZ-Line 12c) must be checked or the Savings Account box (Form 1040-Line 74c)(Form 1040A-Line 45c)(Form 1040EZ-Line 12c) must be checked.
- **Error Code 0121:** On Form 1040, Pensions Annuities Received (Line 16a) must not equal Taxable Amount (Line 16b). On Form 1040A, Pensions Annuities Received (Line 12a) must not equal Taxable Amount (Line 12b).
- **Error Code 0122:** On each Form W-2 that is part of return, the Employer Identification Number (Box b) and the Employer's Name (Box c) must be entered and valid.
- **Error Code 0123:** On each Form W-2 that is part of the return, the following fields are required: Name of Reporting Agent or Employer's Name (Box c); Employer's Address (Box c); Employee's name (Box e); Employee's Address (Box f); Employee's City (Box f); Employee's State (Box f); Employee's Zip Code (Box f); and Wages (Box 1).
- **Error Code 0125:** On each Form 1099-R that is part of return, Payer's Name and Payer Identification Number must be entered.
- **Error Code 0134:** Form 1040 - Based on the boxes you've checked, the standard deduction amount you have selected is not correct.
- **Error Code 0139:** On Form W-2, the Social Security Number (Box a) must equal either the Primary Taxpayer's Social Security Number or the Secondary Taxpayer's Social Security Number.
- **Error Code 0159:** On Form 1040EZ, when no one is eligible to claim you as a dependent, then the Combined Standard Deduction and Personal Exemptions must be \$9350 when Filing Status is Single or \$18700 when Filing Status is Married Filing Joint.
- **Error Code 0160:** Form 1040EZ - When both you and your spouse are eligible to be claimed on someone else's return, your combined standard deduction cannot exceed \$11,400, if Married Filing Jointly and \$5,700, if filing Single.
- **Error Code 0290:** On Forms W-2, W-2G or 1099-R, this code can mean (1) the Payer's State abbreviation is missing or (2) is not a correct standard Postal abbreviation or (3) the Payer's ZIP Code is missing or (4) is not consistent with the Payer's State
- **Error Code 0291:** On Form W-2, the Employer's City (Box c) must contain a minimum of three characters.
- **Error Code 0293:** Please review the reason for the reject. If necessary, make the appropriate change and re-submit this return electronically. However, if the reject

- **Error Code 0370:** For a dependent to be eligible for the child tax credit (Form 1040-Line 52 or Form 1040A-Line 33), the dependent must be your son, daughter, adopted child, grandchild, sister, brother, niece, nephew or foster child, and be under age 17.
- **Error Code 0476:** Your Qualifying Child for the Earned Income Credit can not be over 24 unless the Qualifying Child is a student or permanently disabled and younger than you and your spouse.
- **Error Code 0674:** Authentication Record - The PIN you entered does not match IRS records.
- **Error Code 0676:** Tax Form - When the Filing Status is "2" (Married Filing Jointly), both spouses must enter a valid PIN number.
- **Error Code 0681:** When the Self-Select PIN is used, then the following fields must be present; * Primary Date of Birth, * Primary Prior Year Adjusted Gross Income, * Primary Taxpayer Signature and, * Taxpayer Signature Date.
- **Error Code 0689:** Authentication Record. The year of Taxpayer Signature Date must equal the current processing year 2011.
- **Error Code 1119:** Tax Form - When Direct Deposit information Line 74 on 1040, Line 45 1040A, or Line 12 on 1040EZ is present, Form 8888 may not be present, and vice versa.
- **Error Code 1156:** Tax Form - If the Primary Taxpayer Signature or the Spouse Signature of the Tax Return is significant, then it must be numeric and not all zeros, and the Authentication Record must be present.

I didn't receive a confirmation email after my account was created. What should I do?

If you did not receive a confirmation email when you created an account, it is possible that your spam filter is blocking the email. Check your email account for a spam folder, open it and look for an email from either customer_service@FreeFileFillableForms.org or customer_service@freefilefillableforms.com, depending on your service provider. Each e-mail program and spam filter differs, so please check your e-mail account or service provider for additional help. If you still have not received the e-mail after this step, contact us at 800-829-1040.

I didn't receive an acknowledgment email, why?

Within 48 hours after you file your return using [Free File Fillable Forms](https://www.freefilefillableforms.com), you will receive an email letting you know your return has been accepted or rejected. If you do not see this email in your inbox, please follow these steps:

1. Make sure you are checking the same email account you used to create your account with Free File Fillable Forms

2. Check your spam filter. If the email is in your spam filter, add customer_service@freefilefillableforms.org or customer_service@freefilefillableforms.com to your e-mail safe senders list to ensure that you receive future emails. Each e-mail program and spam filter differs, so please check your e-mail account or service provider for additional help.

3. If you still have not received the e-mail after this step, contact us at 800-829-1040.

I. Printing

Can I print my federal return for free?

Yes, you can print a copy of all required federal forms and supporting documents for your records for FREE.

I forgot to print my return before I e-filed. Can I get a copy?

Yes, return to your account and print your return. Print buttons are on the top and bottom of your screens.

If you need a copy of your return after Oct. 21, 2011, then you may call the IRS toll-free at 800-829-1040 and request a copy of your transcript (Form 4506-T) at no charge. You may also request a copy of your original return for a fee.

What if I am not able to print my return, what should I do?

Check your system requirements and compare them to the [system requirements listed here in Section F of our FAQs](#).

You may need to disable your pop-up blockers. For example, if you are using an Apple computer and a Safari internet browser, you must uncheck the Block Popup Windows at the top menu under the Safari dropdown. The Block Popup Windows is listed as the fourth option from the top. It is defaulted as checked, so you must uncheck it before starting. If you leave the Block Popup Windows checked, you will not be able to print or view the instructions for a specific form or schedule.

You must also have Adobe Acrobat Reader 6.0 version or higher installed to view the instructions and print your return.

Do I have to pay to e-file or print my return?

No, e-filing and printing your Free File Tax Form is free.

What if I can't (or don't want to) e-file? Can I just print my return and mail it in?

Yes, [Free File Fillable Forms](#) supports both e-filing and printing your return to mail into the IRS.

Can I save a copy of my return onto my computer?

Yes! You must change your default printer to Adobe PDF, Microsoft Image Writer or another program that will allow you to capture (print) your return in an electronic format. However, we always recommend you have a printed copy in case you have hard drive issues later.

I forgot to print a copy of my return for my records. What do I do?

Sign in to your [Free File Fillable Forms](#) return with your username and password, and select **Print** at the bottom of the screen.

J. Free Federal Extension

You are able to use Traditional Free File and Free File Fillable Forms to prepare and e-file a Federal Extension.

You may use either Traditional Free File or [Free File Fillable Forms](#) to prepare and file your Federal Extension with IRS.

You will need to file your extension, [Form 4868](#), by **April 18, 2011**.

Before you can complete and e-file an extension (Form 4868, Application for Automatic Extension of Time to File U.S. Individual Income Tax Return), you must first start one of the 1040 forms. Access your account and choose a 1040 form. Complete the personal information on the 1040 form (name, address and SSN).

Once these basic items have been entered, select "File an Extension", in the upper right hand corner and complete Form 4868.

To activate the e-file button for filing an extension, complete all the questions as a part of Step 2 that apply to you. Input the following:

- Email address - in both boxes to validate. Make sure both email addresses match exactly.
- Prior year Adjusted Gross Income, prior year PIN or Electronic Filing PIN number.
- Current Year PIN
- Date of birth
- Current date
- Disclosure statement checkbox is checked
- If filing status is married filing joint, then spouse information must be completed
- Spouse prior year AGI year Adjusted Gross Income, prior year PIN or Electronic Filing PIN number
- Spouse Current year PIN
- Spouse date of birth
- If using Direct Debit all of the following must be entered
- Routing number
- Bank account number
- Debit date
- Type of account
- Electronic Withdrawal disclosure checkbox

Return to the [Free File](#) home page.

K. Other Questions

How secure is my information?

All your tax information entered in [Free File Fillable Forms](#) is protected with industry - standard security or greater. When you e-file, the transaction is encrypted with the same technology used by banks in protecting online transactions. This means that your information is protected from any unauthorized access while it's sent to the IRS.

Why do I have to give you my e-mail address?

[Free File Fillable Forms](#) requires an e-mail address for taxpayers who will need to track the status of their returns via e-mail. After e-filing, taxpayers will receive an acknowledgement of successful filing, and then a message containing the return status from the IRS. Returns are either accepted or rejected. This is important information, since if the return is rejected, it means that it has not been filed. You will need to fix the issue that caused your return to reject. Either e-file again or print and file by mail.

Can I change my e-mail?

Yes. Sign in to your account and edit your account information

Do you sell any of my information to other companies?

No! The information entered in [Free File Fillable Forms](#) will not be sold or marketed to any companies. Please see the [Free File Alliance LLC privacy policy](#) for more information.

Is it safe to use this from a public computer?

It is safe to use [Free File Fillable Forms](#) at a public computer. If you are using a public computer, such as a public library computer or other shared computer, be sure to sign out and completely close Free File Fillable Forms browser before leaving the computer.

What if I do not have an e-mail address?

In order to establish an account, an email address is required. If you do not have e-mail or do not want to enter your e-mail in [Free File Fillable Forms](#), you should track your status at "[Where's My Refund?](#)" to make sure your return is accepted by the IRS.

Are all IRS forms supported?

No. Please refer to the list of supported forms. If there is an "**Add**" button next to a line number, the form is supported and may be accessed by selecting "Add". A list of available forms may be accessed by selecting "View/Add Forms" in the upper right hand corner. A menu will display on the left side of the screen. The forms being used will display in the My Tax Forms section, additionally forms may be accessed by selecting "Add a Form" from the bottom of the "My Tax Forms" box. Unsupported forms will not be available.

If I need a form that isn't supported, can I still use Free File Fillable Forms to do my return?

No. Access the IRS.gov website to ascertain other alternatives for preparing and filing your return.

How do I know which main form to use? (1040 vs.1040A vs.1040EZ)

When you begin using the [Free File Fillable Forms](#), you'll see a brief description of what form is to be used by whom. Complete information is available in the IRS instructions for each of the main forms and can be located on the IRS website.

When will the final form(s) be available?

All forms included in [Free File Fillable Forms](#) are final. For availability information on other forms, type in the KEYWORD Tax Forms on the [IRS](#) website.

Nothing happens when I click the "View/Add" Forms button. What's wrong?

This button opens a window on the left side of the screen that displays a list of forms in the return. If this window is already open, selecting "**View/Add Forms**" will not result in any action.

Can I use this to prepare my state return?

No, [Free File Fillable Forms](#) supports only federal forms.

How do I enter information from more than one W-2?

If you have more than one W-2 reporting income, you can add multiple W-2 forms when you prepare your return for e-filing. On the "**E-file Your Tax Forms**" tab, click the **Add** button next to the information about entering W-2s, near the top. A window appears. At the bottom, click **Add** another Form W-2 - Wage and Tax Statement.

Do I need to mail any forms to the IRS; for example, my W-2, Form W2-G, Form 1099-MISC or Form 1098?

No, if you e-file, you do not need to mail in forms, such as your W-2 or any other information statements but you are required to keep your supporting documentation for three years from the due date of the return.

Can I electronically file using Free File Fillable Forms if my address is in a foreign country?

No, if the address on Form 1040, Form 1040A or Form 1040EZ is in a foreign country you will not be able to electronically file your return. You may still complete the forms and enter the foreign country in the city field, but you will need to print and file your return by mail. For more information about where you should mail your federal return, go to the "[Where to File Paper Tax Returns](#)" page.

What's the latest this year on the Alternative Minimum Tax (AMT)? How do I know if I have to pay?

Please refer to IRS Form 6251 and the IRS website for information on [the Alternative Minimum Tax](#) for the 2010 tax year.

What should I check on my return before I file it?

Your tax return could be rejected for incorrect or incomplete information. When you complete all the required information for electronic filing and click "**Continue**," your tax return will be transmitted to the IRS. To ensure that your tax return is accepted, make sure you have done all of the following items.

- Entered your exemptions
- Entered your standard or itemized deductions

- Calculated and entered your tax amount
- Identify yourself for e-filing by entering the correct and exact amount of Adjusted Gross Income from last year's tax return. Do not guess at this number.

When should I click the "Do the math" button?

The **"Do the math"** button runs calculations for you. Make sure to click **"Do the math"** after you complete each section of a form. If you're unable to enter information into a certain field that means the field is calculated for you.

Will my existing entries be lost if I start over because I chose the wrong booklet/form?

If you think you chose the wrong tax form, you can start over with a new form by selecting the **"I Chose the Wrong Booklet."** However, information already entered will not be saved.

Why are some fields automatically calculated, whereas others require manual data entry?

Fields that can be calculated with simple math are calculated. If the calculation is conditional on other information, like filing status, the field is not calculated and must be entered manually.

How do I know which fields automatically calculate?

Automatically calculated fields will not allow data entry. When you click in the field, a flag will indicate the field is automatically calculated.

I closed the "My Tax Forms" area on the left, how do I get it back?

Select the **"View/Add Forms"** at the top of your screen.

What do the page references on the form refer to? How do I get there?

The pages references on the forms are referring to specific pages in the IRS instruction booklet that accompanies each main form. These instructions are available by selecting **"View Instructions"** at the top of the screen.

What do the different colors mean?

Certain "areas" of the form where the text appears in **red** indicates that the information is either calculated or has been automatically transferred from another form in the return.

Blue text indicates entries which have been manually entered by you. Green text indicates entries which are calculated based on information entered.

Why can't I enter information into a field?

If you're unable to enter information in a certain field that means the field is calculated for you. Select the **"Do the Math"** button to run the calculations. Another possibility is that the form related to that field is not supported in [Free File Fillable Forms](#).

I selected a button on one of my forms, and now I can't undo it.

If you select a radio button on one of the forms and find you can't "uncheck" it, just click on the selected button and then press the delete key.

How to Pay a Balance Due?

You have three options for paying a balance due for your federal return:

- By **Check** - mail a check to the IRS. See the [list of addresses](#).
- By **Direct Debit** - if you e-file your return you can choose to use the direct debit method. Fill in the required information on the e-filing worksheet. If you print and mail your return, you can use the U.S. Treasury's Electronic Federal Tax Payment System <http://www.irs.gov/efile/article/0,,id=97400,00.html> (EFTPS), a free tax payment system that allows you to make payments online or by phone (go to www.eftps.gov or call 1-800-316-6541 for details.)

You can pay by **credit or debit card** by calling a toll-free service (1-888-UPAY-TAX, 1-888-PAY1040 or 1-888-9-PAY-TAX); or accessing the Internet (www.officialpayments.com/fed, www.pay1040.com or www.payUSAtax.com). A convenience fee will be charged by the service provider. See [Publication 3611](#), e-File Electronic Payments Brochure for more information.

If I have a balance due and can't pay right now, is there a payment plan available?

Paying your taxes in full and on time avoids unnecessary penalties and interest. However, if you cannot pay your taxes in full, you may request a payment agreement. You can pay by **installment method** upon approval from the IRS. Fill out [Form 9465, Installment Agreement Request](#) and you will be notified if your request has been approved.

Online payment agreement application
<http://www.irs.gov/individuals/article/0,,id=149373,00.html>>

Can I use this to e-file my return?

You can use [Free File Fillable Forms](#) to e-file your federal return. This means you are filing your return electronically over the Internet.

Why is the “e-file Now” button on the “E-file Your Tax Forms tab” gray?

The “**e-file Now**” button is gray when it is deactivated. The button will remain gray and deactivated until all information on the form is completed and both email addresses match.

In order to activate the “**e-file Now**” button, make sure you have entered all of the following information:

- Email address – in both boxes to validate. Make sure both email addresses match exactly.
- Prior year Adjusted Gross Income, prior year PIN or Electronic Filing PIN number.
- Current Year PIN.

- Date of birth.
- Current date.
- Disclosure statement checkbox is checked.
- If filing status is married filing joint, then spouse information must be completed
 - Spouse prior year Adjusted Gross Income (AGI), prior year PIN or Electronic Filing PIN number
 - Spouse Current year PIN
 - Spouse date of birth
- If using Direct Debit all of the following must be entered
 - Routing number
 - Bank account number
 - Debit date
 - Type of account
 - Electronic Withdrawal disclosure checkbox

I discovered a mistake after I e-filed. Can I get my return back?

No! Once your return is transmitted you will not be able to access it again and make changes. If you need to make a change, you will need to file an amended return on paper.

Do I need to do anything else after e-filing my return?

Yes, you should track your return to make sure the IRS accepts it. If you entered a valid e-mail address when you created your account in [Free File Fillable Forms](#), you will receive acknowledgement of successful transmission and then acknowledgment that the IRS accepted or rejected your return. If you printed and filed your return[s], you may access refund information about your federal income tax return through the IRS' secure Web site 72 hours after IRS acknowledges receipt of your return. [Where's My Refund?](#) is fast, easy and safe. You will need to enter three pieces of information from your e-filed return:

- Your Social Security Number or Individual Taxpayer Identification Number
- Your filing status
- The exact whole dollar amount of your expected refund

What are some common reasons for "Transmission Failed Errors"?

This type of error means the return was not transmitted to the IRS because of certain problems - usually missing or incorrect information. The most common reasons for this type of transmission failure are:

- Missing address (including street, city, state and ZIP code)
- Missing name
- Missing Social Security Number (SSN)
- Missing bank information for direct debit (RTN, Account number)

Return to your tax return and make sure all this information is complete and accurate, and then transmit the return again. If you are unable to resolve this error, you should print the return and file by mail. For more information about where you should mail your federal return, go to the ["Where to File Paper Tax Returns"](#) page.

How Do I Allow Pop-ups?

First, determine which internet browser you are using then follow these instructions for that browser. Note that the steps may vary depending on your browser version. See your browser's Help.

Internet Explorer:

1. On the Tools menu, click Internet Options.
2. Click the Privacy tab.
3. Under Settings, move the slider to Medium.
4. Under Pop-up Blocker, clear the Block pop-ups field.
5. Click OK

Firefox:

1. On the Tools menu, click Options.
2. On the Options window, select the Privacy icon.
3. Select Accept cookies from sites, and then click OK.
4. On the Options window, select the Content icon.
5. Clear the Block Popup Windows field, and then click OK.

AOL:

1. On the Tools menu, click Settings.
2. Click the Internet Options button.
3. Click the Privacy tab.
4. Under Settings, move the slider to Medium.
5. Under Pop-up Blocker, clear the Block pop-ups field.
6. Click OK.

Safari:

1. On the Safari menu, click Block Pop-Up Windows to remove the checkmark.
2. On the Safari menu, click Preferences.
3. Click the Security icon at the top of the window.
4. Under Accept Cookies, select "Always".
5. Close the Preferences window to save the settings.

Can I save my return and finish it later?

Yes, when you start your return in [Free File Fillable Forms](#), you will create an account, which is protected by a username and password. Your data is automatically saved as you work through your returns in Free File Fillable Forms. If you take a break, be sure to sign out of your return.

Where is my data stored?

All tax data is stored in the secure [Free File Fillable Forms](#) database.

Can I retrieve my return online in the future? For how long?

You will be able to access your tax return until Oct. 15, 2011, which is the last day you can file a tax return if you requested an extension. Sign in to your return with your user ID and

password. After that, your return will be backed up (which is an IRS regulation), and then removed from the Free File Fillable Forms database.

What happens if I start a return but don't come back and finish it?

No matter when you start your tax return, it will be accessible in the [Free File Fillable Forms](#) system until Oct. 15, 2011, upon which it will be removed from the database. Your return will not be filed or e-filed.

Are you able to delete my data upon request?

No, but you can delete your data by selecting the "**Start Over**" option and then sign out of the return. This will clear any data previously entered in your tax return.

How do I fix mistakes or make changes after I've filed my return?

If you need to make changes before you e-file or print your return, simply review the entries on your forms and make the changes. However, if you realize you made a mistake and have already e-filed, you will need to wait until the return is either accepted or rejected by the IRS. If rejected, correct the mistakes and the reason for rejecting and then e-file again. If accepted, you will have to file an amended return.

How do I file with a foreign address?

If you are filing your own International federal tax return, go to the [International "Where to File Addresses"](#), for specific return type.

How do I enter a literal on my return?

The program is designed so that you can enter a literal in the shaded area to the left of the field on forms 1040, 1040A and 1040EZ. Some lines have one shaded box and only a text value can be entered in this field. Some lines have two shaded boxes, the first for the text value and the second for the amount related to the text value.

The program is enabled for e-filing for users who have one literal on a line (whether that is text only or the text and related amounts). If your return requires you to have multiple literals on a single line (either multiple text only fields or multiple text and amount fields) or if you have a literal that is required on a form other than forms 1040, 1040A and 1040EZ, then you will not be able to e-file using this program.